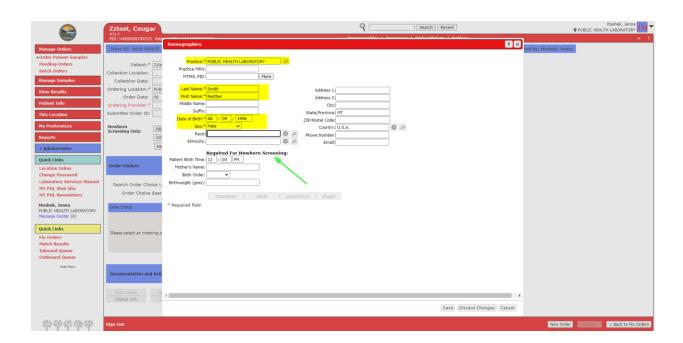
Procedure for Ordering Samples in HHS Lab Portal

- Sign in with your username and password.
- Under "manage orders" click "Order patient samples"
 - Start typing the patient's name. (Last name first)
 - If the patient is in the system under your practice, the patient will pop up under a drop-down menu.
 - Select the correct patient from this menu. Confirm the patient's information is correct after selecting the patient.



- If the patient is not in the system click "new patient" at the bottom of the drop-down menu.
 - ♦ The "new patient" button will bring up the demographics page to fill out.
 - ◆ Type your MR for the patient in the "Practice MRN" Field.
 - ◆ The required fields are "Last Name", "First Name", "Date of Birth", and "Sex".
 - Please provide all other available information such as race, ethnicity, and address.
 - Additional fields are required for newborn screening.

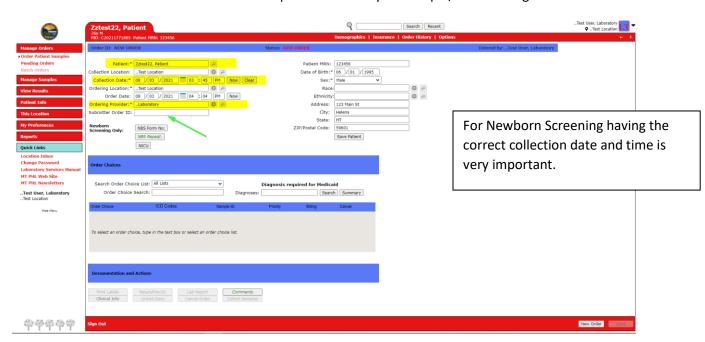


For Newborns:

- ♦ If the baby has yet to be named, the first name should be entered as "Boy/Girl mother's name". (ex. BoyJane)
- ♦ In the case of multiple babies (twins) please add the birth order letter in front of the first name (ex. ABoyJane). Only use these letters for multiple births, not single births.
- Fill out "Patient Birth Time", "Mother's name", "Birth Order", and "Birthweight".
 - "Mother's name" should be entered as Last name, First name.



- Once all the patient information has been entered click "Save". This will save the patient in the system for future use.
 - ◆ Once you click "Save" it will close the demographics page and return to the order screen.
- > Fill out the "Collection Date" and the "Ordering Provider."
 - If the provider you would like to use is not on the list please use "..Laboratory." AFTER saving the order, create a ticket on the order to have the new provider added to the system (see p. 16 for instructions).
 - The Submitter ID field is an optional field for your sample/accessioning number.



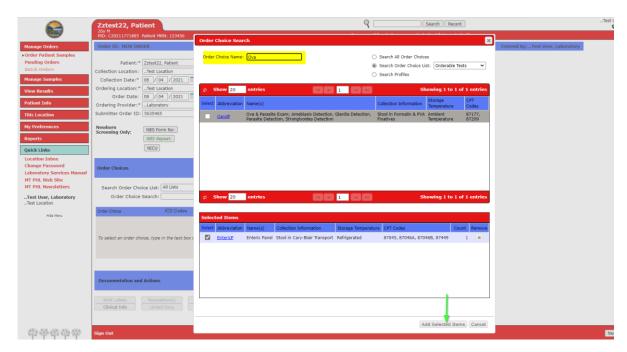
Please ensure the correct collection time and date are entered on the order screen for newborn screening orders. For newborn orders, "NBS Form No", "NBS Repeat", and "NICU:" are required. Click on these buttons to enter this information.



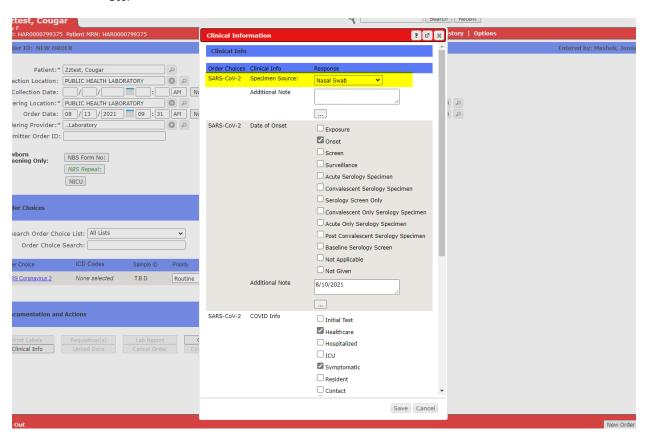
- "NBS From No:" is the serial number from the NBS bloodspot collection card.
- "NBS Repeat:" is yes or no.
 - If the sample is a repeat this should be marked as a yes.
- "NICU" is yes or no.
 - If the baby is in the NICU this should be marked as a yes.
- Once all the required information is entered, the system will then allow typing in the "Order Choice Search". Start typing in the order choice Search field or select a list to filter by. (See the document How to Search for Tests (mt.gov) for more detailed instructions)



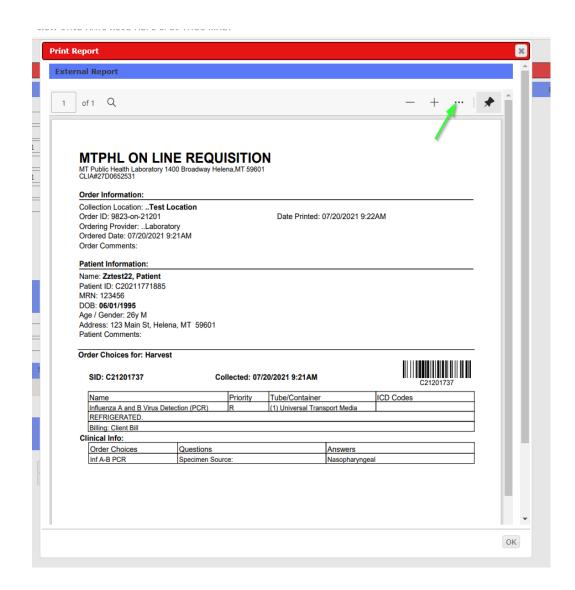
- This will then open a smaller screen where you can choose from the order choices available to your practice.
- > Select the test/tests you would like for this patient sample. Press "Add Selected Items".



- If the test that is to be performed on this sample is not on the choice list, please choose "Misc. test 2" and use the Additional Order Information button to tell us what you are trying to order.
- If tests are being requested on two different specimen/sample types, please put these on separate orders.
- If you need to enter Medicaid billing information, see p. 13 for instructions.
- ➤ If you need to provide any additional information about the order for our staff, use the "Additional Order Information" button below the order choice list. This information will appear at the top of the requisition.
- Once the order choice/choices are selected and added to the patient's order, click "Save."
 - This will bring up the clinical questions for you to answer.
 - Depending on the specimen source, you may need to enter an additional note for this question. For example, if you choose "Lesion Swab," please indicate the site of the lesion in the additional note. Only type something in this field if it pertains to the specimen itself. A source like "Nasopharyngeal Swab" needs no further information.
 - If the Date of Onset question appears:
 - Select Onset or Exposure if there is an exposure or symptom onset date; and type the date in the Additional Note field.
 - For serology testing, use "serology screen only" if there is no exposure/onset date.
 - For covid testing select the appropriate choice: screen, surveillance, onset, exposure, etc.



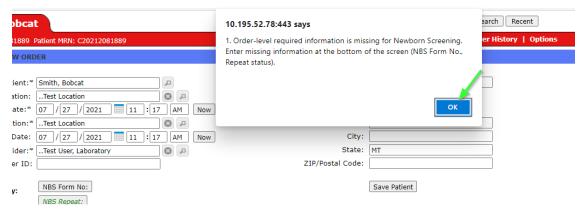
- After answering all clinical information questions, click Save. (see p. 6 for exceptions that may occur at this point)
- If there are no exceptions, the requisition will be displayed on the screen and will need to be printed and sent with each sample. Please do not print requisitions for newborn screening orders. (The paper filled out on the blood spot card is the requisition.)



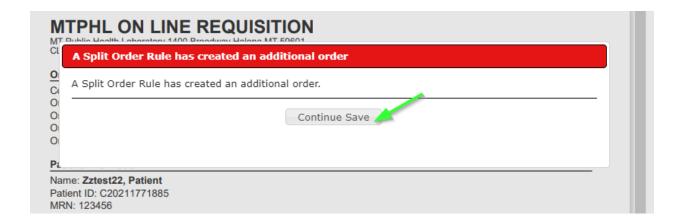
Once all the requisitions have been printed, you are done placing orders for the day, and you have all the orders that will be sent to the state lab together, a manifest must be created to be sent with the samples to MT State Public Health Laboratory. See p. 7 for how to create a manifest.

Exceptions that may occur when clicking "Save":

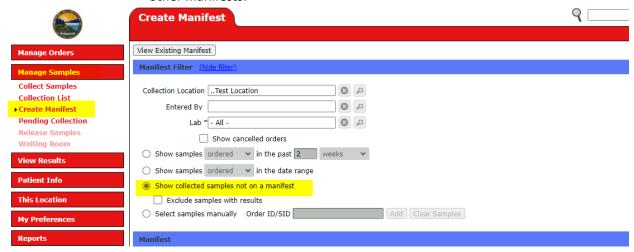
- ❖ If required information is missing on an order, a message will pop up.
 - Click okay.
 - Once the missing information is input then click "save".



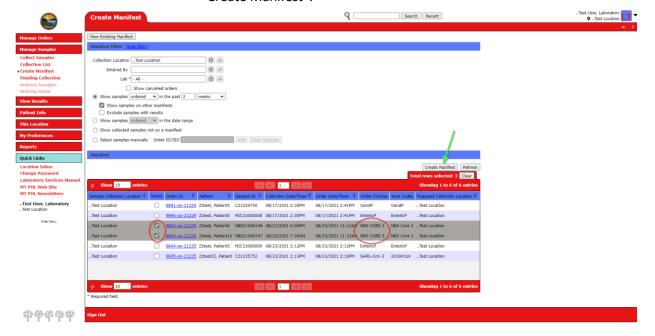
- The clinical questions will appear. Click "save" again.
- if there are multiple tests on the same order but they are for different sections in our lab, a screen will pop up with a warning that a split order choice rule was applied. Press "continue save".
 - The system will split the orders, and separate requisitions will be displayed for each in sequence. Print each requisition and include all of them with the sample.



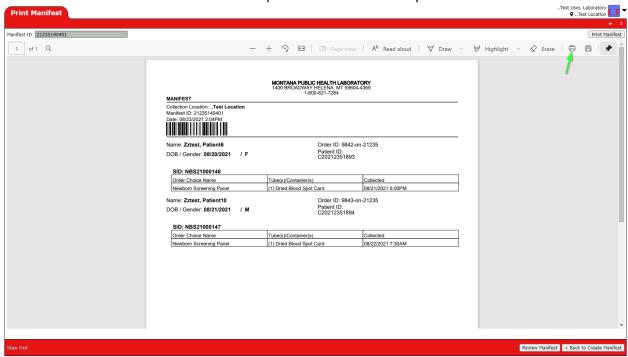
- Creating a Manifest
 - Under manage samples click "create manifest"
 - ◆ This will bring up all the orders that have been created from your location that have not been placed on a manifest yet.
 - ➤ Other criteria can be selected if a sample is not found on this list, including samples that are on other manifest or from past collection dates that are on other manifests.



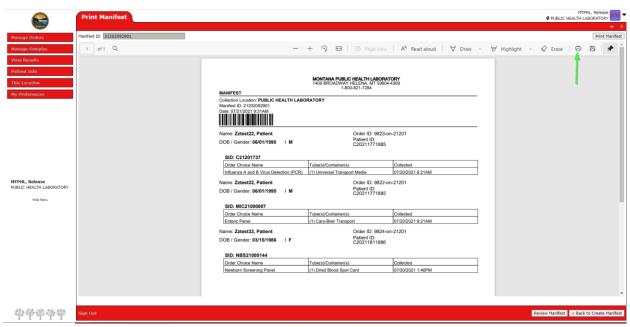
- Please create separate manifests for Newborn Screening samples vs all other samples.
 - When creating a manifest for Newborn Screening, look at the Order Choice column, and select all Newborn orders by clicking in the select box. Click "Create Manifest".



This will bring up a manifest just for Newborn Screening. Print and send this manifest in the envelope with the dried blood spot cards.

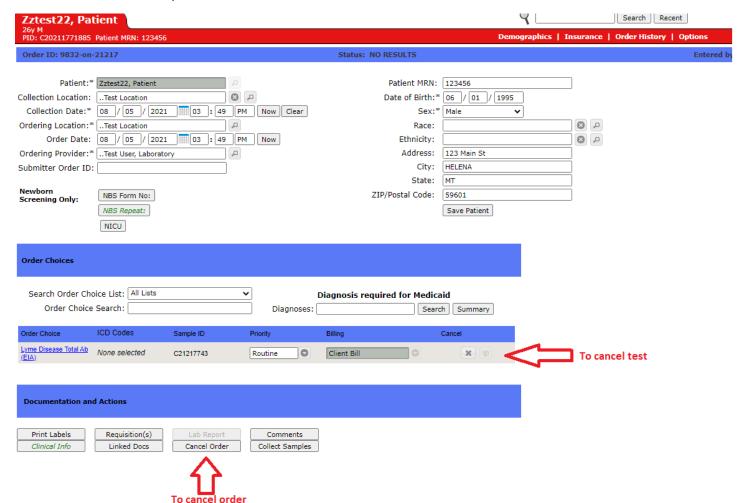


- Then select all other orders that will be sent to the MT State Public Health Laboratory. If this is all the orders on this page the word "select" can be pressed to select them all.
- Once all samples (other than Newborn Screening) are selected click the "create manifest" button. This will open a screen from where the manifest can be printed.
- Print this manifest and send it with the samples to the MT State Public Health Laboratory.



Canceling and Adding on tests

- You can cancel an order or a test up until the point that it has been completed.
- To cancel an order or test, open the order (see the procedure for how to search for an order).
- Once you've opened the order, you can cancel the entire order by clicking the "Cancel Order" button.
- You can cancel an individual test on an order by clicking on the X in the cancel column next to the order you want to cancel.



- Note the status of the order at the top. You can cancel a test or order up to the point that it has been completed. Once the status is Complete, the cancel buttons will be greyed out.
- When you click cancel, you will be asked to enter a reason. Pick a reason from the drop down list.
 You can enter additional info in the box.



Once you've entered a reason, click Proceed with Cancellation at the bottom of the screen.

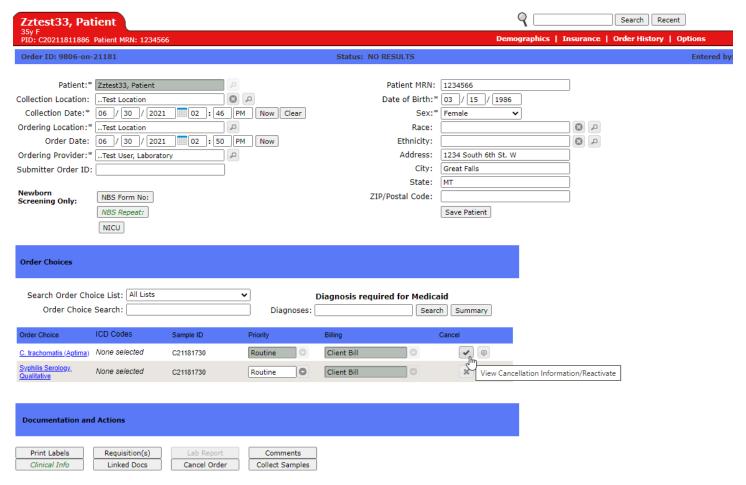


It will take you back to the order screen. If you've canceled a test, you need to click save. If you've canceled the order, the status will have changed to Canceled.

Canceled tests appear with lines through them in OEL.



You may re-activate a canceled test (not an order), by clicking on the check mark next to a canceled test.



Select a reason for re-activation (use other and explain in the box.) Then click Proceed with Re-activation.

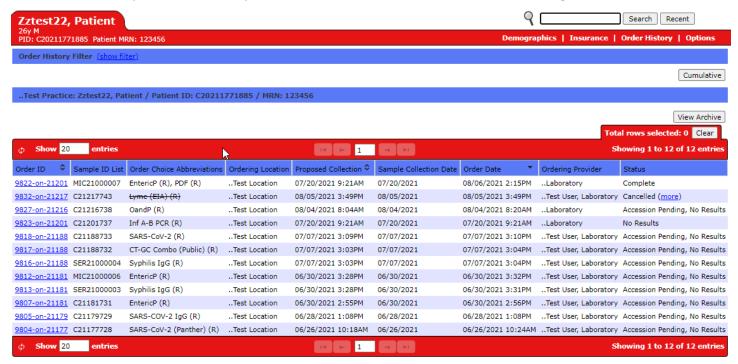


Add-on Testing

> You may add-on a test to an existing order if it is not yet complete. If the order is complete you will need to create another order. To add a test, look up the order, and once in the order add order choices and save the same way that you would if you were entering a new order.

❖ ANY TIME YOU CANCEL, ADD OR RE-ACTIVATE A TEST FOR A SAMPLE THAT HAS ALREADY BEEN RECEIVED BY OUR LAB YOU MUST CALL or FAX TO LET US KNOW

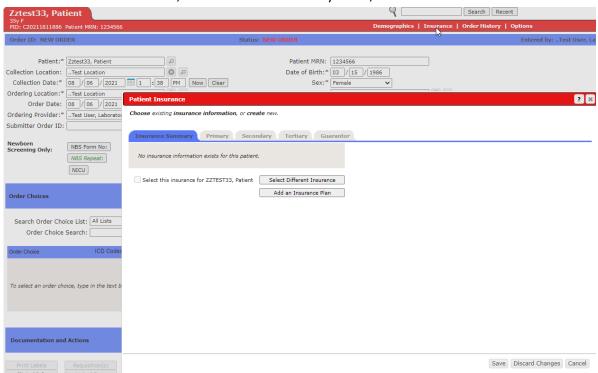
Samples that have not yet been received have a status of "Accession Pending".



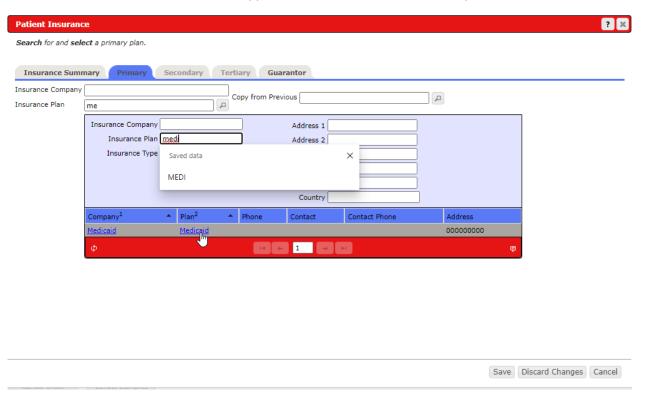
- > To fax, just print the requisition from the system and make a note as to what you are doing, then fax to us at 406-444-5527
- To print a requisition, from the order history screen right click on the order and select requisition, or from within the order, click on the requisition button.

Entering Medicaid Information

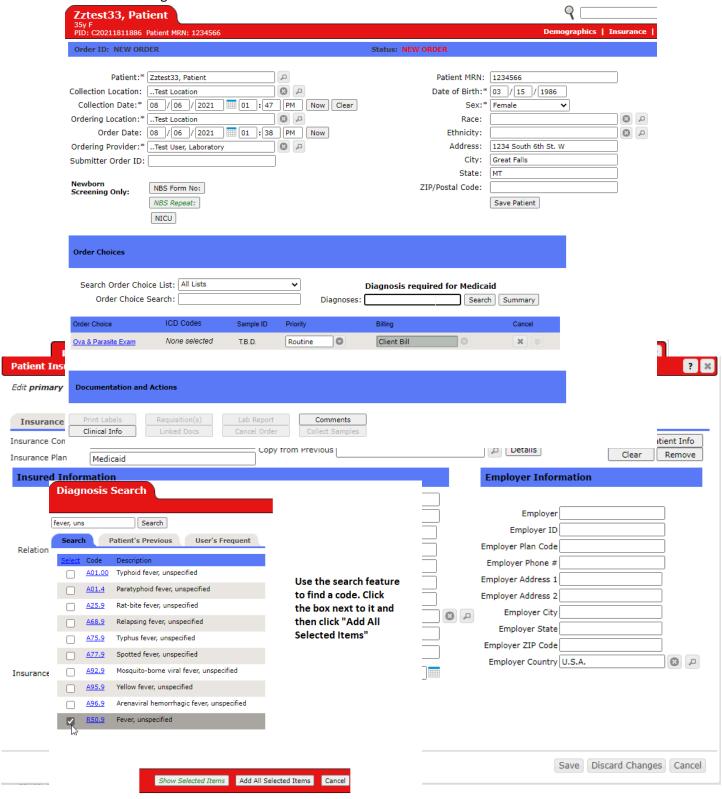
- From the Order Patient Samples Screen, Click Insurance in the top menu bar.
- On the Insurance screen, if Medicaid is not already listed, Click "Add an Insurance Plan"



- > It will take you to the Primary Insurance Tab. Start typing "Medicaid" in the Insurance Plan field.
- > The Medicaid Plan should then appear in the list. Click the Medicaid plan.

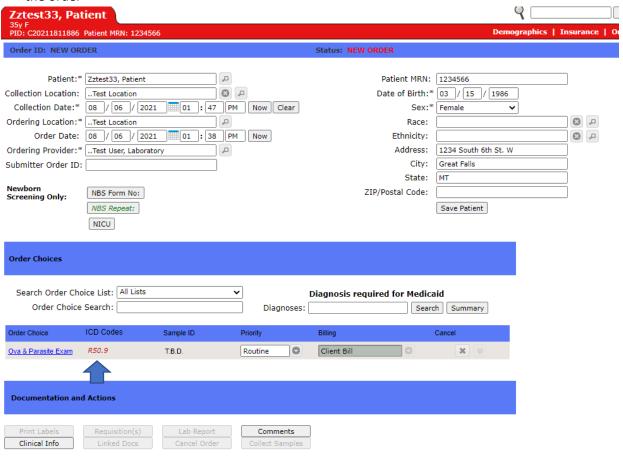


- Click Select when the Medicaid plan information pops up.
- Enter the policy number in the Policy field (this field is required). Then click Save.
- Once all the rest of the order information is filled in, you must enter at least one diagnosis code for Medicaid billing.

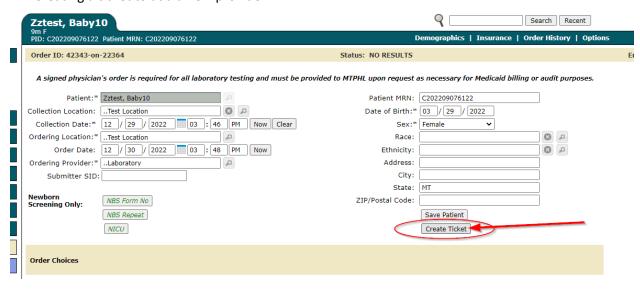


You can type the code directly in the field or use the search button to find a code.

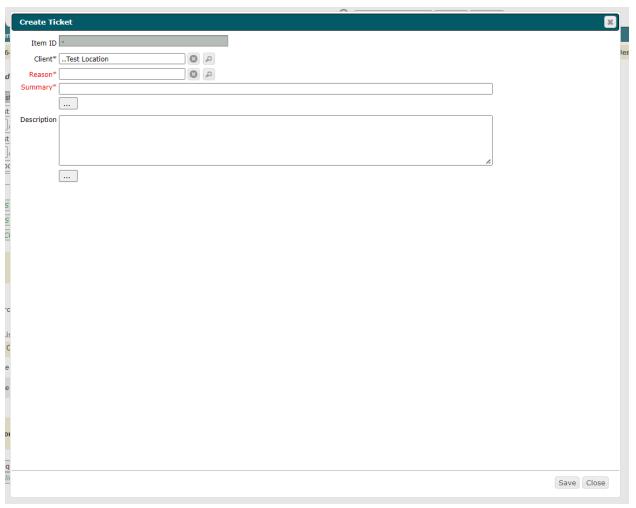
Once you've entered diagnosis codes, they will appear under the Order Choice(s) you entered on the order



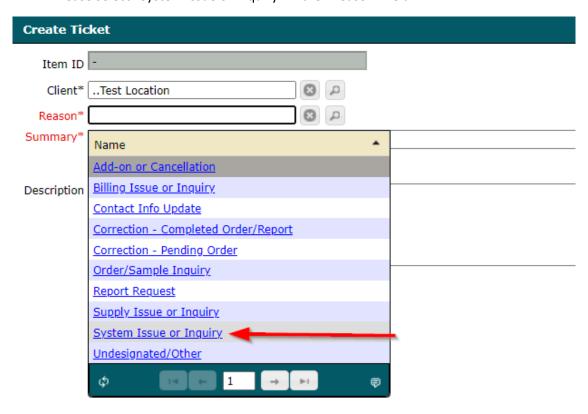
Creating a ticket to add a new provider



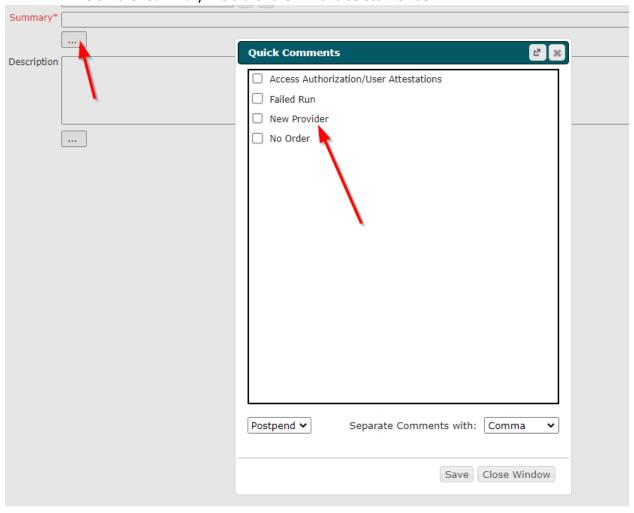
- After saving the order the "create ticket" button will be available.
- Click create ticket
 - Create ticket screen
 - The "Client" field will be automatically filled with the location you are signed in as.



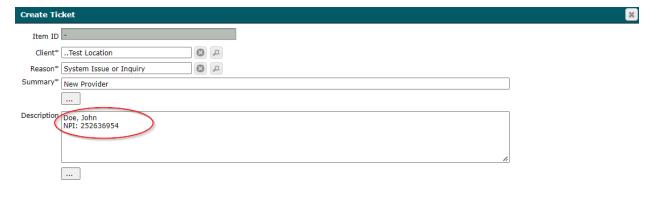
• Please select "System Issue or Inquiry" in the "Reason" field.



Below the "Summary" field click the "..." and select Provider



• In the "Description" field please put the doctor's name lastname, firstname and the doctor's NPI number. Then click "save".





• This ticket will be linked to this order, and we will work this ticket as soon as possible to get the doctor in our system.